

## Proposals

**Michael J. Rosen, CFRE**

**President**

**ML Innovations, Inc.**

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**215.928.1636**

### **I. General Ethics Session**

**Audience:** This session is designed for all audiences.

**Presenter:** Michael J. Rosen, CFRE

**Previously Presented:** This session, in only slightly altered forms, has been presented at AFP Brandywine, AFP Central Pennsylvania, AFP Maryland, AFP Northeast Indiana, PBS Development Conference, Institute of Fundraising Conference (UK), Villanova University *Fundamentals of Fundraising*

#### **When is it Okay to Look a Gift Horse in the Mouth?**

The more ethical an organization is perceived as being, the more easily it will attract supporters and the more those supporters will contribute. While doing the right thing is always wise on general principle, this session will uncover the actual monetary value of consistently taking the right path and explain when it is okay to look a gift horse in the mouth. This highly interactive, fast-paced session will explore some ethical challenges and reveal a simple model for resolving even the most difficult ethical dilemmas. This session will give you the practical skills necessary to help you be the kind of development professional you desire to be. If you want to learn how you can make better decisions without relying just on “gut feeling,” this session will prepare you for successfully taking on any future ethical challenge.

#### ***Alternative Session Title and Description:***

#### **How to Always Do the Right Thing and Raise More Money**

The more ethical an organization is perceived as being, the more easily it will attract supporters and the more those supporters will contribute. While doing the right thing is always wise on general principle, this session will uncover the actual monetary value of consistently taking the right path. This highly interactive, fast-paced session will explore some common ethical challenges and reveal a simple model for resolving even the most difficult ethical dilemmas. This session will give you the practical skills necessary to help you be the kind of development professional you desire to be. If you want to learn how you can make better decisions without relying just on “gut feeling,” this session will prepare you for successfully taking on any future ethical challenge.

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**II. Planned Giving (or General Fundraising) Ethics Session or Keynote Presentation**

**Audience:** This session is for those with at least some gift planning (or fundraising) responsibility.

**Presenter:** Michael J. Rosen, CFRE

**Previously Presented:** Partnership for Philanthropic Planning of Greater Philadelphia, Gift Planning Council of New Jersey, National Capital Gift Planning Council, Philanthropic Planning Group of Greater New York

**Ripped from the Headlines: Learning from the Mistakes of Others**

Being a planned giving superstar requires more than a working knowledge of gift planning vehicles and a mastery of fundraising skills. To be truly successful, you need to avoid the many development pitfalls, including some that might surprise you. During this interactive session, you will learn from the real mistakes of others, stumbles that have captured unfortunate headlines involving issues including the honoring of donor intent, returning donations, safeguarding prospect privacy, avoiding undue influence, suing your donor, and more. As a result, you will be able to save yourself from costly public embarrassment and earn the trust of your donors.

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### **III. Planned Giving Session**

**Audience:** This session is designed for development generalists as well as those with some planned giving experience. This is not intended for planned giving experts.

**Presenter:** Michael J. Rosen, CFRE

**Previously Presented:** AFP Greater Arizona, AFP Ft. Lauderdale/Broward County and AFP Northeast Indiana chapters, and the 2008 AFP International Conference

#### **How to Make Your Planned Giving Results Go Up Faster than Gas Prices**

When gas prices go up, they do so at break-neck speed. When gas prices decline, they do so slowly. Economic, environmental, and cultural factors contribute to the volatility in gas prices. Similarly, a number of factors have now converged making this a time of increasing planned giving potential. Whether you are a planned giving novice or expert or, even, a development generalist, you can help your organization raise dramatically more planned giving dollars. This program will review the factors creating this unique planned giving opportunity. To capitalize on this opportunity, you will learn powerful ideas that are effective and easy for any organization to implement. By implementing even a few of these tips, you will be able to increase your planned giving results even faster than gas prices rise.

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#### **IV. Planned Giving Session**

**Audience:** This session is designed for all development professionals who have responsibility for generating planned giving support.

**Presenter:** Michael J. Rosen, CFRE

**Previously Presented:** AFP, Memphis Chapter, AFP Delaware Brandywine Chapter, National Capital Gift Planning Council

#### **What Can Science Teach Us about Planned Giving?**

Who are your best planned giving prospects? Do they even know what “planned giving” is? Are men or women better planned giving prospects? What motivates your prospects? What demotivates prospects? How do your prospects actually think when they consider planned giving? What one word is costing your planned giving program a fortune?

Scientific research gives us the answers to these and other questions. We no longer need to guess at the answers or rely solely on experience. In this program, the winner of the AFP-Skystone Partners Prize for Research in Fundraising and Philanthropy will look at how we can apply what research teaches us to enhance our planned giving efforts and make the gift planning experience more meaningful for donors.

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**V. Planned Giving Session**

**Audience:** This session is designed for all development professionals who have at least some planned giving responsibility.

**Presenter:** Michael J. Rosen, CFRE

**Previously Presented:** Planned Giving Council of Greater Philadelphia

**Who Makes Charitable Bequests and Why?**

Of all planned gifts, 89 percent are bequests. Unfortunately, there are many myths about who makes the charitable bequest. Some believe it is the older woman who has given \$10 a year for 20 years. Others believe it is only the wealthy philanthropist. Still others believe it is impossible to know who will make a charitable bequest and to which nonprofits. Fortunately, recent research and actual conversations with donors reveal the truth about who makes charitable bequests and where those bequests are going. This session will help organizations focus their planned gift marketing efforts on higher potential prospects. In addition, attendees will learn how to project their own organization's planned giving potential so they can justify the investment in a newly focused marketing program.

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## **VI. Planned Giving Session**

**Audience:** This session is designed for all development professionals who have at least some planned giving responsibility.

**Presenter:** Michael J. Rosen, CFRE

**Previously Presented:** New Seminar

### **Why the Future Belongs to Gift Planners**

The so-called intergenerational wealth transfer has begun. All the research, all the acute discernment, all the latest innovation, point to the future as a tremendous growth phase for planned giving. Do you know what is happening and where gift planning is going? Will you be ahead of the curve or trying to catch up? This session will take a broad look at the business of gift planning and see what is possible. Participants will review the planned giving environment, newly emerging marketing models, and professional-culture shift.

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## **VII. Planned Giving Session**

**Audience:** This session is designed for all development professionals who have at least some planned giving responsibility.

**Presenter:** Michael J. Rosen, CFRE

**Previously Presented:** AFP New Jersey Chapter, Forum for Fundraising webinar

### **Planned Giving by Phone???**

You already know that the phone works for generating annual fund and capital campaign dollars. Now discover how the phone can help you raise tens of millions of dollars in planned gifts. Find out why this is the perfect time to simply ask in an innovative way. Participants will discover who makes the best planned-giving prospects, calculate their organization's planned giving potential, and learn about an innovative technique for mining that potential.

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### **VIII. Planned Giving Session**

**Audience:** This session is designed for all development professionals who have at least some planned giving responsibility.

**Presenter:** Michael J. Rosen, CFRE

**Previously Presented:** New Seminar

#### **Case Statements: The Key to Unlocking Planned Gift Support**

The process of developing a rationale for support or case statement, as well as the final document itself, is a critical step to realizing your organization's full planned giving potential. Developing a case statement will help you achieve organizational consensus, recruit and maintain strong volunteer leadership, test the market, tell a compelling story, and create first-rate communication materials. This interactive session will review the key components of a case statement, examine how a planned giving case statement differs from other types, and explore how to use the process and completed document to secure more planned gifts. Participants will also calculate their organization's gift planning potential.

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**IX. Planned Giving Session**

**Audience:** This session is designed for those new to planned giving and all development professionals who have at least some planned giving responsibility.

**Presenter:** Michael J. Rosen, CFRE

**Previously Presented:** The Philadelphia Foundation

**“Unlock Hidden Assets in Tough Times: Invest in Planned Giving”**

This interactive seminar takes a fresh look at the pressing importance of gift planning during economically challenging times, particularly as donors become increasingly concerned about making current gifts. While most nonprofit organizations receive planned gifts from only a small percentage of their potential donors, enormous potential exists for involving supporters in bequests, gift annuities, or other forms of planned giving. You will learn how planned giving is holding up in the current market, what your own organization’s planned gift potential is, who makes planned gifts, what motivates them, and a few simple tips for marketing to prospective planned gift donors.

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**X. Keynote Presentation**

**Audience:** This session is designed for all development professionals.

**Presenter:** Michael J. Rosen, CFRE

**Previously Presented:** This is a new presentation.

**What I Learned from Cheating Death**

In March 2014, my doctor told me that I probably had two years to live, maybe five years if I had surgery and got lucky. After the initial shock from the news wore off, I began to think about my family, my work, my legacy, and more. The questions I asked myself are questions we all ask eventually. I was just asking them all at once and with some urgency. Fortunately, after a 14-hour surgery, I learned that all the cancer was removed, and I could look forward to a full life. Now, having gone through the experience and having asked the tough questions, I can share some insights that will help you better relate to donors and more effectively take charge of your life and career. Plus, I'll give you a tip that could save your life.

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**XI. Keynote Presentation**

**Audience:** This session is designed for all development professionals.

**Presenter:** Michael J. Rosen, CFRE

**Previously Presented:** AFP Memphis Chapter.

**The Seasons of My Childhood: Important Fundraising Lessons for a Lifetime**

Michael J. Rosen, CFRE began his fundraising life when he was just eight-years-old. Every season of the year presented another opportunity to raise money for a worthy cause. With each challenge came the chance to learn fundamental lessons about raising money, lessons that have been proven valuable for a lifetime. By reflecting on his childhood fundraising adventures, Michael will talk about the importance of identifying prospects, leveraging relationships, securing sponsors, and always maintaining a donor-centered outlook. This fun journey into the past will reveal core fundraising principles relevant for every nonprofit organization today.

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**XII. Keynote Presentation**

**Audience:** This session is designed for all development professionals.

**Presenter:** Michael J. Rosen, CFRE

**Previously Presented:** This is a new presentation.

**Forget the Golden Rule!**

We have all been taught the importance of the Golden Rule -- Do unto others as you would have others do unto you. Unfortunately, there is a major flaw here: The Golden Rule is inherently self-centered! To be effective fundraising professionals, we cannot be self-absorbed. Instead, we must practice the Platinum Rule if we want to maximize success. In addition to learning the Platinum Rule, you will hear many practical tips to help you implement it.

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**XIII. Keynote Presentation or Regular Seminar**

**Audience:** This session is designed for all development professionals.

**Presenter:** Michael J. Rosen, CFRE

**Previously Presented:** This is a new presentation.

**What Can You Learn about Fundraising from a Starbuck's Barista and Other Unlikely Sources?**

Over the years, I have learned many valuable fundraising lessons from unexpected sources. I will share some of the wisdom I have gathered from a Starbuck's barista, a Capitol Grill chef, an Au Bon Pain manager, comedians Key and Peele, and singer Taylor Swift. Precious insights exist all around us just waiting to be noticed. Now, you can gain helpful, practical tips from some of those unlikely sources.

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#### **XIV. Planned Giving Session**

**Audience:** This session is designed for all development professionals who have responsibility for planned giving. It is intended for those looking to create a new planned giving program or those interested in building a recently started program.

**Presenter:** Michael J. Rosen, CFRE

**Previously Presented:** The Fundraising Authority (webinar), Pennsylvania Association of Nonprofit Organizations (webinar), Wild Woman Fundraising (webinar)

#### **How to Launch and Market a Planned Giving Program at Your Nonprofit**

**or**

#### **Planned Giving: It's Easier and More Worthwhile than You Think**

For many nonprofit professionals, planned giving sounds complicated, with its CRUTs, CRATs, CLUTs, and CLATs. Admittedly, gift planning can indeed be incredibly complicated. But, as this webinar will demonstrate, it does not have to be. Furthermore, a planned giving program can be enormously worthwhile, for virtually any organization, even if you have little or no budget for it.

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**XV. Fundraising Session**

**Audience:** This session is designed for all development professionals.

**Presenter:** Michael J. Rosen, CFRE

**Previously Presented:** This is a new presentation based on my most read blog post.

**Can a Nonprofit Return a Donor's Gift?**

Fundraising professionals are correctly focused on raising money. But, when something goes wrong, can you return a donor's gift? You will learn when you can and cannot return a donor's contribution in addition to when a charity is actually obligated to return a donor's gift. You'll also learn what charity regulators say, what the courts have ruled, and some simple things you can do to avoid this situation all together.